COUNTY OF SAN DIEGO
Great Government Through the General Management System – Quality, Timeliness, Value
DEPARTMENT OF HUMAN RESOURCES

CLASS SPECIFICATION   **CLASSIFIED**

RETIREMENT MEMBER SERVICES SUPERVISOR   **Class No. 007559**
RETIREMENT MEMBER SERVICES SENIOR SPECIALIST   **Class No. 007557**

■ CLASSIFICATION PURPOSE

To supervise and administer employment benefits (pension and health insurance programs), and related payroll control systems; to provide retirement benefit information and counseling, and to perform related work as required.

■ DISTINGUISHING CHARACTERISTICS

These classes are allocated only to the San Diego County Employees Retirement Association (SDCERA.) Incumbents supervise and train staff and are responsible for the daily administration of retirement benefits and services to current employees, deferred employees, retirees, and beneficiaries who are general or safety members. Duties are performed pursuant to policy direction from the Board of Retirement, provisions of the California Government Code (County Employees Retirement Law of 1937) and related benefit, employment, and tax laws, and county personnel rules and payroll regulations.

Employees in these positions are designated as "confidential employees" and process confidential personnel, retirement, medical, and legal documents.

Retirement Member Services Supervisor:

This is the first-line supervisory-level class in this series. Under general supervision, this class performs the most difficult and complex benefit counseling and member account reviews; schedules and plans daily operations and monthly payroll; and develops and updates policy, procedures, and forms.

Retirement Member Services Senior Specialist:

Under general supervision, this class performs end-user acceptance testing and evaluation of new or upgraded retirement/benefit administration software and systems; is assigned to long-term process improvements and special projects; and conducts in-service technical training requiring in-depth knowledge of retirement law and internal processes. Incumbents may perform functional second-line supervision.

■ FUNCTIONS

The examples of functions listed in the class specifications are representative but not necessarily exhaustive or descriptive of any one position in the classes. Management is not precluded from assigning other related functions not listed herein if such functions are a logical assignment for the position.

Essential Functions:

The following functions apply to both classes:

1.   Establishes and revises operating and administrative policy and forms.

2.   Interprets and accurately applies federal, state, and county regulations for pension/health insurance administration and retiree payroll operations and plans for and initiates changes as needed.

3.   Enters and retrieves data into confidential human resources, personnel, and payroll systems.

4.   Participates in labor relations negotiations regarding employee benefits.

5.   Provides detailed information of retirement benefits and options to employees and retirees.

6.   Coordinates the preparation of information for mass communications to members of the retirement association.

7.   Composes correspondence, and prepares statistical reports.

8.   Requisitions services and supplies.

9. Provides responsive, high quality service to county employees, representatives of outside agencies and members of the public by providing accurate, complete and up-to-date information, in a courteous, efficient and timely manner.

Retirement Member Services Supervisor (in addition to the common essential functions):

1. Supervises assigned staff.

2. Conducts interviews, orientation and training for new-hires.

3. Plans and schedules work; establishes performance goals, and reviews work and documents employee performance.

4. Performs complex data entry and retrieval assignments for payroll adjustments, garnishments, overpayments, death benefits, contributions and premiums, and approves payments.

Retirement Member Services Senior Specialist (in addition to the common essential functions):

1. Conducts end-user evaluations and audits of personnel, payroll, and benefits administration databases and calculations to assure accuracy.

2. Troubleshoots system problems and errors.

3. Presents training sessions for member services staff and serves as the super-user for pension and retirement benefits systems.

■ KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

The following applies to both classes:

– SDCERA organization, internal policy, procedures, operations, and functions of the member services division.
– County Employees Retirement Law of 1937, (California Government Code) ERISA and related regulations.
– Departmental policies, procedures and forms.
– Office administration.
– Controls and techniques for administering group health plans.
– Principles and techniques for administering retirement payroll.
– Federal and state law regarding earnings, deductions, withholding, taxes, and social security and Medicare.
– County of San Diego personnel and payroll system policy and procedure and related human resources and timekeeping systems; retirement benefit sections of Memorandums of Agreement, County Civil Service Rules and Compensation Ordinance.
– Terminology related to human resources information systems, data processing and electronic imaging.
– County customer service objectives and strategies.

Retirement Member Services Supervisor (in addition to the above):

– Principles and techniques of supervision.
– Accounting principles to reconcile and balance payroll runs, benefit contributions, and allowances.

Skills and Abilities to:

– Plan, organize, direct, and schedule work assignments.
– Develop, read, interpret, and explain to others policies and procedures.
– Communicate effectively, orally and in written form.
– Establish effective working relationships with management, employees, employee representatives and the public representing diverse cultures and backgrounds.
– Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
– Research, compile, summarize and analyze data, and draw conclusions to present recommendations.
– Enter, retrieve, update, and evaluate data in a benefits (pension and health insurance) system database, human resources information system, payroll system, and electronic (imaged) personnel files.
– Operate a personal computer.
– Use Microsoft Office applications including Word, Excel, Outlook, and Internet Explorer.
– Develop procedures, plans, presentations and mailings for communications with retirement association members.
– Make presentations before large and small groups.
– Exercise appropriate judgment in answering questions and releasing information; analyze and project consequences of decisions and/or recommendations.

Retirement Member Services Supervisor (in addition to the common skills and abilities):

– Plan, organize, direct, and schedule work assignments.

–   Establish standards, review and evaluate work performance.

Retirement Member Services Senior Specialist (in addition to the common skills and abilities):

–   Perform system end-user evaluations and audits.
–   Work with information technology personnel regarding process changes and improvements.

■ EDUCATION/EXPERIENCE

Education, training, and/or experience that demonstrate possession of the knowledge, skills, and abilities listed above. Examples of qualifying education/experience are:

Retirement Member Services Supervisor:

1.   One (1) year of lead-level or first-line supervisory experience with responsibility for on-the-job technical training; planning, assigning, and reviewing work; establishing performance goals and standards; and counseling employees; AND either

    A.   Two (2) years of experience as a Retirement Member Services Specialist with SDCERA or equivalent duties with another retirement/benefits organization or human resources/personnel operations, OR

    B.   Five (5) years of experience in the retirement benefit industry to include transaction processing, record keeping, and problem solving administrative experience relating to retirement pension, health insurance, disability and death benefit processing.

Retirement Member Services Senior Specialist:

In addition to the above, experience must have included integrating and troubleshooting benefit administration systems, process improvement and end-user testing/evaluation for retirement, human resources and/or payroll systems, and interfacing with information technology experts.

Notes:

1.   A bachelor's degree from an accredited college or university in public or business administration, accounting, or human resources management can be substituted for up to one year of the required experience listed in B above.

2.   Professional designation as a Certified Employee Benefits Specialist (CEBS) can be substituted for up to one year of the required experience listed in B above.

3.   Previous experience in a California CERS, PERS, or STRS system or a similar defined benefits system in a public agency, municipal retirement system, or bonafide retirement plan is highly desirable.

4.   Completion of California Association of Public Retirement Systems (CALAPRS) Overview and Basic training courses or one module of CEBS series is highly desirable.

■ ESSENTIAL PHYSICAL CHARACTERISTICS

The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of the classifications. Reasonable accommodation may be made to enable an individual with qualified disabilities to perform the essential functions of a job, on a case-by-case basis.

Continuous upward and downward flexion of the neck. Frequent: sitting, repetitive use of hands to operate computers, printers and copiers. Occasional: walking, standing, bending and twisting of neck, bending and twisting of waist, squatting, simple grasping, reaching above and below shoulder level. Some positions may require the ability to perform moderate lifting up to 20 pounds.

■ SPECIAL NOTES, LICENSES, OR REQUIREMENTS

License

A valid California class C driver's license, which must be maintained throughout employment in this class, is required at time of appointment, or the ability to arrange necessary and timely transportation for field travel. Employees in this class may be required to use their own vehicle.

Certification/Registration

None Required.

Working Conditions

Office environment; exposure to computer screens.

Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

Probationary Period

Incumbents appointed to permanent positions in these classes shall serve a probationary period of 12 months (Civil Service Rule 4.2.5).

Retirement Member Services Supervisor (Class No. 007559)	Union Code: CE	Variable Entry: Y
Retirement Member Services Senior Specialist (Class No. 007557)	Union Code: CE	Variable Entry: Y